U.S. Army Recruiting Command

College Market Analysis

Agenda

- **Defining the College Market:** Definitions, key attributes, targets, Stop-outs, Competition, Top-line Market Perspective
- **Institutional Information:** Number of institutions, ROTC, Campus recruiting programs, Stop-out rates
- **Student Information:** General research findings, Attitudes toward college, Attitudes toward the military, Enrollment plans, Enrollment stats
- **Summary / Recommended College Analysis Projects**

Defining the College Market

- **College Market:** Qualified individuals who are planning to attend college, are currently attending college, have stopped out of college, or have earned a certificate or degree from a post-secondary institution.
- **College Contract Production:** Applicant records (EAF) with one or more semester hrs, one of three "some" college, EDYRS > 12, one of eight "degree" PREVED codes, or College First.
- **Key Attributes:** Mobile; higher AFQT scores with higher ed-levels; goal-oriented; 2 yr/4 yr/degree sub-markets; increased Hispanic representation in the Some College category.
- **College Targets:**
  - **Intention to attend/Enroute to college**
    - **College ASAP ("College First" without college credits)**
    - **Delayed attendance ("ACF" without college credits)**
  - Stop-outs and Potential Stop-outs (who are they?)
  - Successfully attending (USAR target potential > RA)
  - College graduates

College Stop-outs

- **Institutions with Highest Stop-out rates:**
  - **Public institutions**
  - **2 yr institutions (higher rates at 2 yr, higher volumes at 4 yr)**
  - **"Open Enrollment" institutions**

- **Individual Stop-outs tend to be…**
  - **Freshman** (drop during the year/don't return for Sophomore yr)
  - **First-generation** college students
  - **Low GPA** students (< 2.0)
  - Students in **remedial reading** courses
  - Students **working >35 hrs/wk** (*financial-problem indicator*…)
  - Students who **delayed college** enrollment after High School
  - Students with **low or moderate participation** in campus activities

Financial Aid data can help target college markets at 4 yr Public and Private i

College Market Analysis

Top-line Market Perspective

Much of today's youth and their COIs believe that *college attendance is a requirement* upon high school graduation.

This dynamic drives a large portion of our Grad market to the college campus and, therefore, also drives USAREC to the College Market -- a market which provides increased quality and exists *on and off the college campus*.

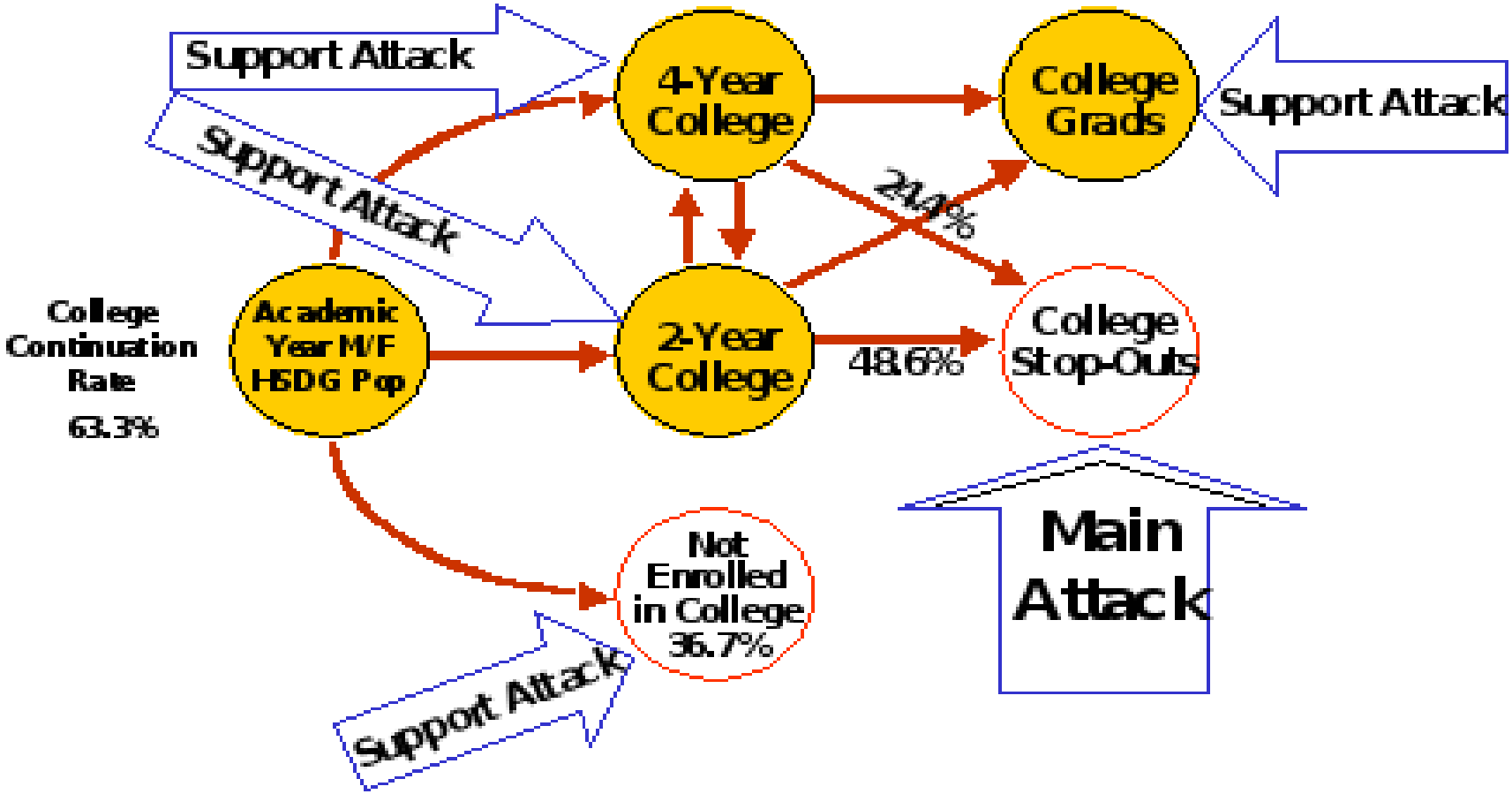
Where we produce college contracts depends on where t
***college continuum* at the point**
of the enlistment decision.

Competition w/i the Market

- **All branches of service (recruiter & incentives increases)**
- **National Guard (at state-funded institutions)**
- **Military Academies**
- **Industry (UPS, etc.)**
- **Financial aid opportunities (loans, grants, etc.)**
  - **Socioeconomic challenges increased financial aid options.**
  - **Increased financial aid increased stop-out rates**
  - **Note: 2 yr institutions are less expensive decreased financial aid**
  - **Financial aid is highest at Private 4 yr inst., followed by Public 4 yr inst., and then Public 2 yr. Inst.**

College Market Penetration Partnership with U.S. Army Cadet Cmd

College Target Markets



Institutional Information

Institutional Overview

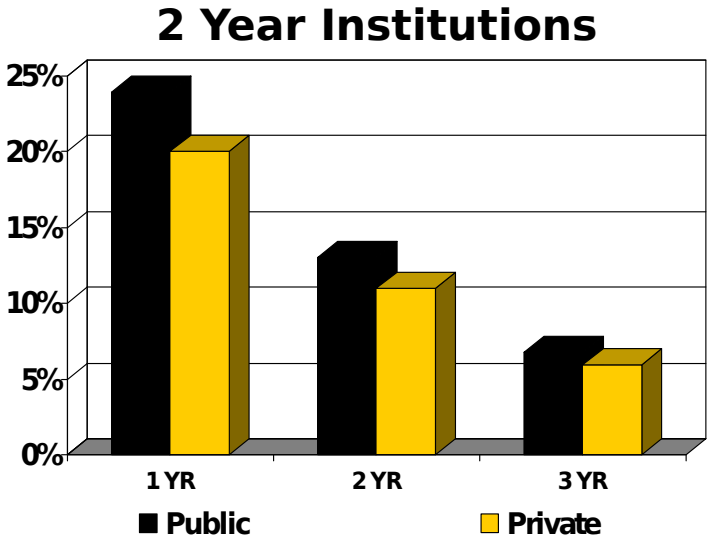
FAZR	LT 2	2 Yr	4 Yr	Total
Public		1098	252	1350
Private		1156	1620	2776
Army ROTC			669	669
HBCU		11	29	40
HSI		102	60	162
VOTECH	1578	2		1580
TOTAL	1578	2369	2630	6577

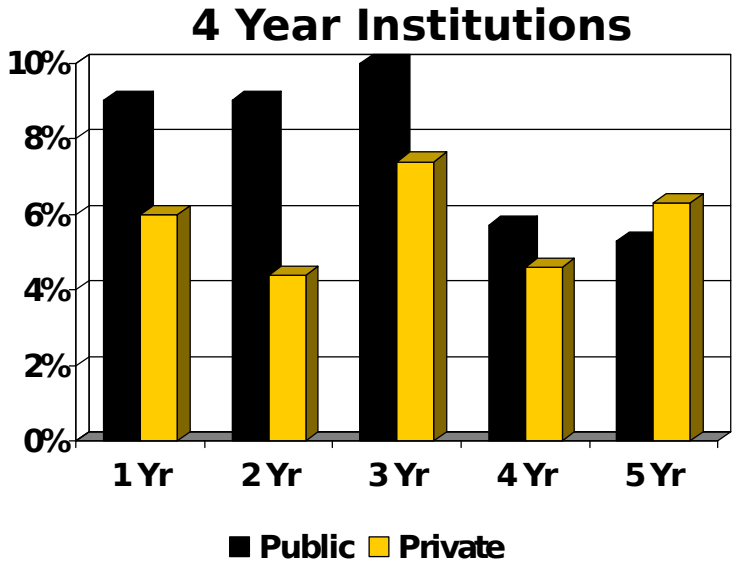
IPEDS Only	LT 2	2 Yr	4 Yr	Total
Public	117	80	12	209
Private	2426	343	213	2982
Army ROTC			21	
HBCU		1	1	2
HSI		7	2	9
Total	2543	431	249	3223

- 48% of HBCUs are Publi
- 41% of HBCUs have RO
- 68% of HSIs are Public.
- 84% of HSIs have ROTC

- FAZR contains over 90% of all schools listed in the IPEDs database (not including LT 2 yr inst. -- added at field discretion only)
- PAE can provide IPEDS Only school data to field for review.

Stop-Out Rates





Type of Institution	Cum. Stop-out rate at end of 3d year
2 yr Public	44%
2 yr Private	30%
4 yr Public	19%
4 yr Private	18%

- **2 yr Publics have highest cumulative stop-out rates.**
- **Stop-out rates greatest during first years of college.**

Source: LoiL FY01 CSAG (Stop-out rates include "Drop

Student Information

Research on the College Market

- College continuation rates may have **peaked**.
- Most HS students form educational plans between the **8th and 10th grades**.
- College plans and military plans are **inversely related**.
- Decline in military propensity not due solely to **rising college aspirations**.
- Military propensity higher among **males planning to attend 2 yr. Institutions**.
- **82%** of HS graduates whose **parents completed college** enrolled in college **immediately** after finishing HS, as compared to:
  - **54%** of those whose parents had **not gone beyond HS**
  - **36%** of those whose parents had **not completed HS**
- **First-generation students** differ from other students in terms of **age** and **enrollment characteristics** and are **less likely to return** to a 4 yr inst. if they stop-out.

Source: "Should Military Rctrs Write Off the College Bound" Armed Forces and Society, Vol 27, No 3, Sp

Psychographics - College Student Attitudes

(towards College)

- College experience is expected to:
  - Ensure a brighter job / income opportunity
  - Be positive (“fun”)
  - Delay adulthood
- VoTech and Community Colleges:
  - Allow HS friendships to continue (proximity to home)
  - Provide a degree (for income potential) without 4 yr COA
  - Not as intimidating
  - Bolster academic skills
  - Less costly (financial restraints)
  - Provide additional planning time

Source: College Market Focus Group, Y&R Army Group Mar 00

Psychographics - College Student Attitudes

(towards Military)

- **Option of last resort when …**
  - **Can't find educational funding**
  - **Lack focus for their future**
  - **Can't find appropriate civilian employment**
- **Benefits of Army service can be obtained through other sources**
- **The Military is…**
  - **Very demanding (and some students admit laziness)**
  - **Too confining / structured -- much more so than HS/College**
- **Low pay compared to civilian opportunities**
- **Won't deliver the desired job/location**

Source: College Market Focus Group, Y&R Army Group Mar 00

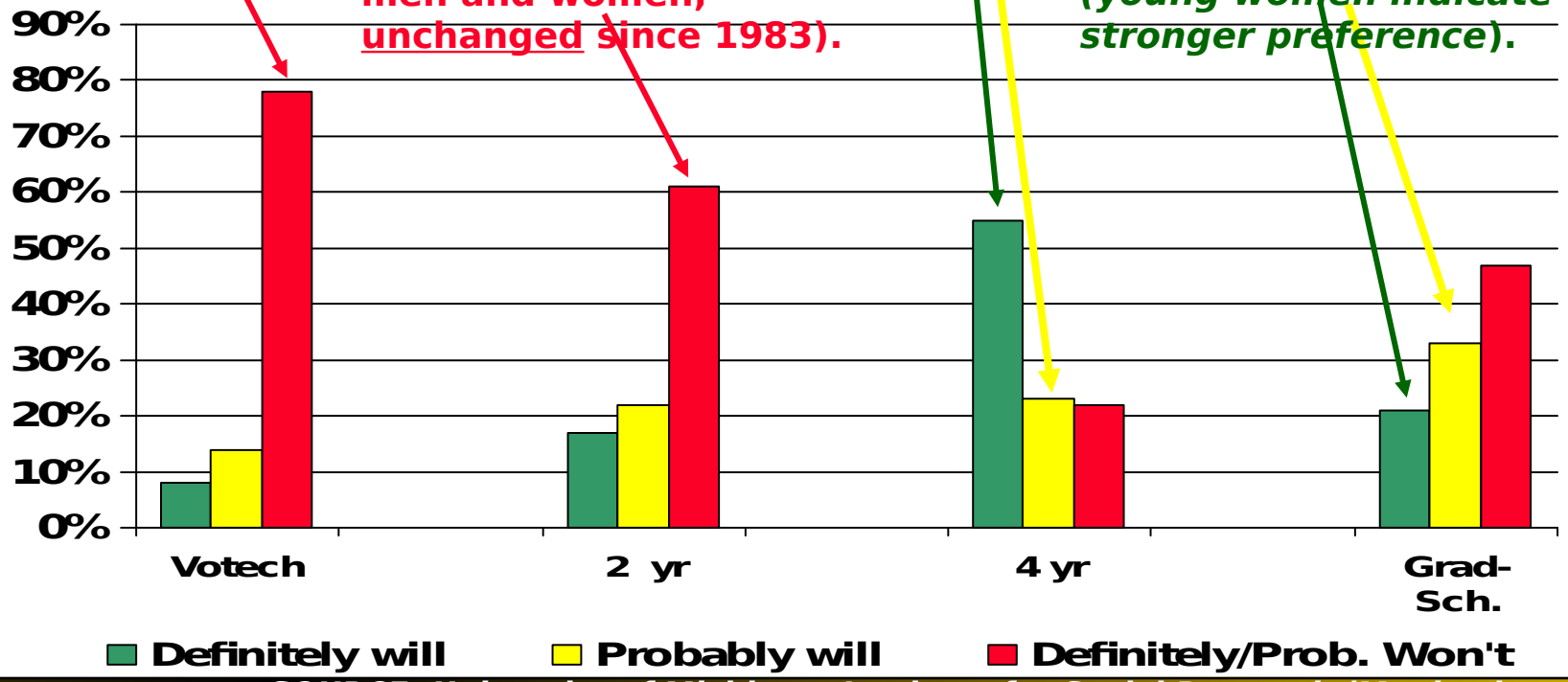
Educational "Plans"

Consideration lowest for VoTech and has declined since 1983 *(young men indicate stronger VoTech plans)*.

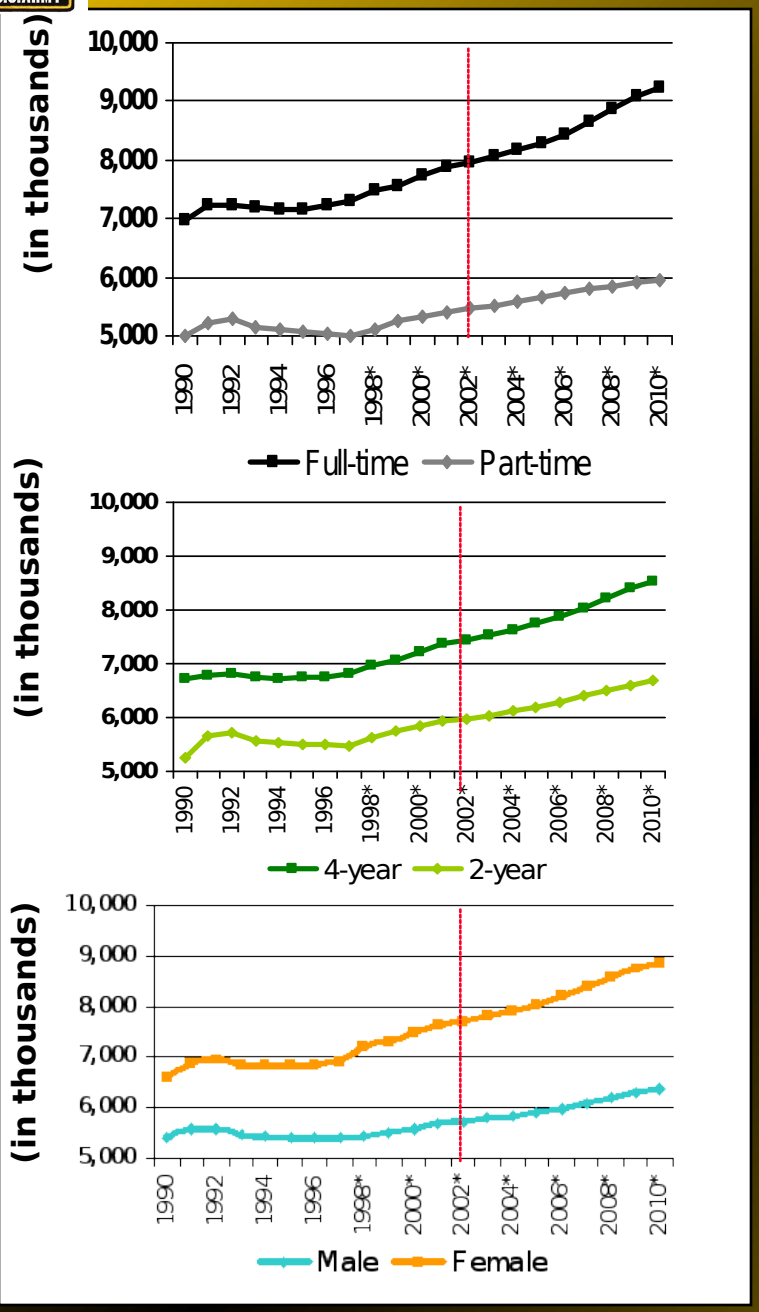
2 yr programs have 2d lowest consideration (equal among young men and women; unchanged since 1983).

4 yr programs have strongest preference and Def/Prob.will has increased 20%since 1983 *(young women indicate stronger 4 yr program plans)*

Graduate program Def/Prob.will increased 19%since 1983 *(young women indicate stronger preference)*.



SOURCE: University of Michigan, Institute for Social Research (Monitoring the Future Survey: 1998).



College Enrollment

- **College enrollment rates steadily increasing in all categories:**
  - **Full-time rate > Part-time rate**
  - **4 yr rate > 2 yr rate**
  - **Female enrollment > male enrollment**
- **More full-time than part-time students**
- **More students enrolling in 4 year institutions rather than 2 year**
- **More females are attending college than males**
- **Note: Youth population is increasing at a faster rate than the total youth college population.**

Source: NCES The Condition of Education 200

Summary

- There may be increased college enrollment and increased competitive funding opportunities, but stop-out rates continue to provide a high quality recruiting market.
- Convince the college market that the Army provides an effective, quality means for accomplishing higher education, financial recovery, and career opportunity gain. The college market is goal-oriented.
- Target top-producing Bns / counties.

Further Recommended Analysis

- Build institution-specific production profiles
- Assess Bn priority colleges: stop-out rates, county production data, college recruiting programs